Systems Integration and Outsourcing Opportunities in the Client/Server Environment

J.P. Richard
Vice President
Manager
Outsourcing Program

Brian Wessner
Manager
Systems Integration Program

Systems Integration Opportunities in the Client/Server Environment

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Brian Wessner

Program Manager
Systems Integration

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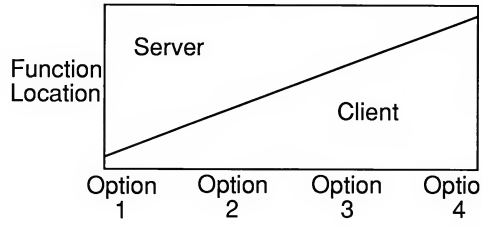
Client/Server Boundaries
Where is the Balance?



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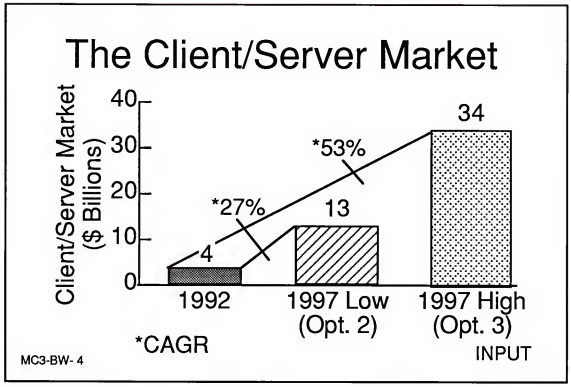

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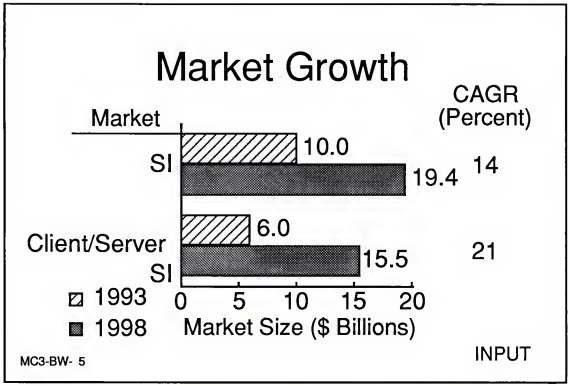

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Client/Server Affects Systems Integrators

- Increased complexity
- Multiple architectures
- Users acquiring services
- Smaller SI projects

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Client/Server Demands New Skills

- LANs, MANs, WANs
- Open systems
- System design and management
- Workflow
- Business process

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Client/Server Not Always the Answer

Say "Yes" to Client/Server

- Local control of data, applications
- Matches business function
- Speed applications development
- Scalability
- Cost reduction

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Client/Server Not Always the Answer

Say "No" to Client/Server

- Data remaining centralized
- Unable to support completed system
- Users unwilling to manage system
- Security
- Cost increase

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Client/Server Opportunities

Increasing Value to Client

- Coupling to business process and workflow projects
- Helping client determine benefits and high-value applications
- Expanding legacy systems portfolio

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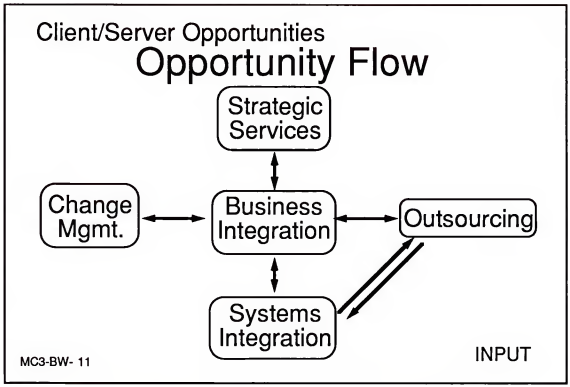

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Client/Server Opportunities

Key Indicators

- 30% of companies have a client/server migration strategy
- 40% say next system will be client/server
- Approximately 70% will use client/server for any new applications

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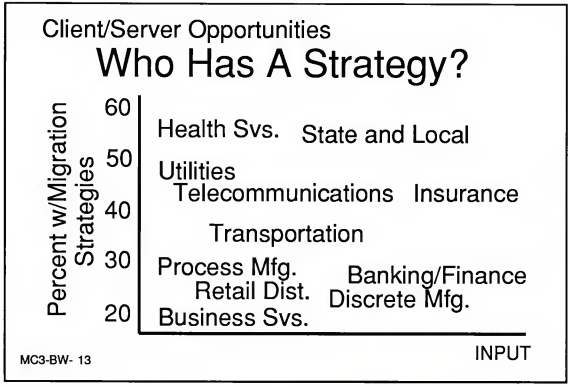

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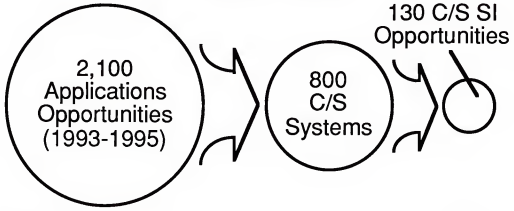
Client/Server Opportunities

The Challenge: Market Awareness



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Outsourcing Opportunities in the Client/Server Environment

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J.P. Richard

Vice President
Manager
Outsourcing Program

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Client/Server Shift

Impacts Outsourcing Market

- Positive
  - Transition outsourcing opportunities
  - New opportunities in:
    - Desktop services
    - Network management

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Client/Server Shift

Impacts Outsourcing Market

- Negative
  - New contracts
    - Shorter duration
    - Lower value
  - Existing contracts
    - Renegotiations
    - Changing requirements

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Outsourcing Market Growth Pattern Changing

Type of Outsourcing	$ Billions 1993	$ Billions 1998	CAGR (Percent)
Platform Ops.	3.9	6.7	12
Application Ops.	5.4	11.2	15
Application Mgmt.	0.6	1.7	27
Desktop Svcs.	1.4	3.6	21
Network Mgmt.	1.3	4.1	26

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Proportion of Outsourcing Market Related to C/S Shift

Type of Outsourcing	1993 (Percent)	1998 (Percent)
Platform Ops.	20	20
Application Ops.	20	80
Application Mgmt.	10	70
Desktop Svcs.	100	100
Network Mgmt.	50	90

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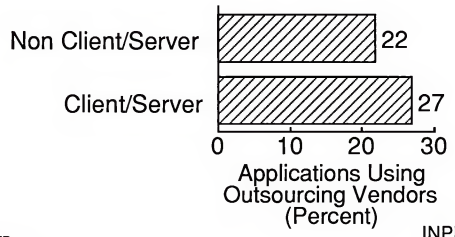
Use of Outsourcing Vendors C/S Vs. Non C/S Applications



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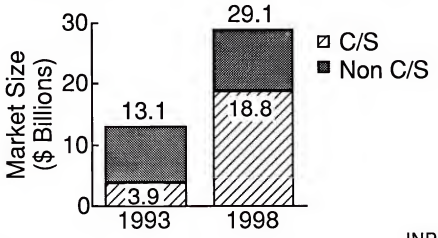
New Opportunities Created by C/S in Outsourcing



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Vendor Responses to Client/Server Challenge

- ISSC
  - Expand SI responsibilities/capabilities
  - Develop business/consulting skills
- EDS
  - Expand TPD to Europe market
  - Refine methodology and logistics expertise

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Vendor Responses to Client/Server Challenge

- CSC
  - Team with CSC Index and CSC Partners
  - Leverage existing system integration capability
- Digital
  - Leverage network management strength
  - Capitalize on strong hardware client base

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Conclusions

- Market shift to accelerate
- Contracts will reflect changes
  - Short term
  - Share in savings
- Market leaders continue to innovate

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JEAN-PAUL RICHARD
VICE PRESIDENT

PROFILE

CAPABILITIES

- Mr. Richard has 23 years of experience in the data processing industry. He has served as a systems analyst and has held management positions in marketing, field and headquarters sales, as well as strategic planning.
- Mr. Richard directs the Outsourcing Information Systems Program and has administrative responsibility for INPUT's Vienna office.

BACKGROUND

- Prior to joining INPUT, Mr. Richard served as a program manager at Boeing Computer Services, emphasizing acquisition of federal government business. At General Electric Information Services, he held positions as manager of sales planning and sales administration. He also managed commercial sales and marketing offices in Canada and France for General Electric Information Services.
- Mr. Richard began his data processing career as a systems analyst. He moved to a client services environment dealing with a range of firms from insurance companies to chemical manufacturers.

EDUCATION

- B.S., Chemistry, Northeastern University, Boston, Massachusetts
- M.S., Industrial Management, Sloan School, MIT, Cambridge, Massachusetts

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BRIAN P. WESSNER
MANAGER
SYSTEMS INTEGRATION PROGRAM

PROFILE

CAPABILITIES

- Mr. Wessner has 21 years of experience in the computer industry, including 16 years of financial and management responsibility in consulting, client services, and product management.
- With INPUT, Mr. Wessner provides information and consulting to executives and planning managers in the systems integration and professional services markets. He specializes in analysis and forecasting of major trends in these markets, particularly in software, services, and the impact of information technologies on the development and delivery of services.

BACKGROUND

- Previously, he was a market segment manager of Legent Corporation, a Vienna, Virginia developer of systems management software. Prior to that, Mr. Wessner was with Amdahl Corporation and KPMG Peat Marwick, responsible for management consulting projects with major Fortune 500 corporations. Projects included EDP planning, organizational analysis, and systems management.
- Mr. Wessner started his career with United Technologies in 1972 in software development for a manufacturing environment.

EDUCATION

- B.S. (Aerospace Engineering), Parks College of Aerospace Technology, St. Louis University, St. Louis, MO.
- M.S. (Computer and Information Science), University of New Haven, New Haven, CT.